

# TOP 12 CHINA CONSUMER TRENDS

2026



**CHOZAN**  
BY ASHLEY DUDARENOK

# ABOUT CHOZAN

Founded in 2016, ChoZan is an immersive corporate education, research, and digital transformation firm with offices in Hong Kong, Shenzhen, and Shanghai. We help global Fortune 1000 companies understand how China is evolving — and what they can learn from it.

China is the world's most advanced digital market. We help senior leaders experience it firsthand, learn from it directly, and apply those insights to their own transformation journeys.

## WHAT WE DO

### CHINA LEARNING EXPEDITIONS & INNOVATION TOURS

Our tailored study tours take teams inside China's leading tech giants, startups, and innovation hubs. Participants gain firsthand exposure to AI, robotics, smart retail, and other cutting-edge developments — and return with actionable insights to drive their own transformation. We've worked with companies including Coca-Cola, Deckers, and Disney.

### KEYNOTES, WORKSHOPS & BOARDROOM BRIEFINGS

Our founder, Ashley Dudarenok, is a globally recognized China digital expert and bestselling author. Her dynamic keynotes and executive briefings cover topics such as digital disruption, innovation, applied technologies, and the new retail. We've upskilled teams at companies such as 3M, Shiseido, MTN, and Bank of America.

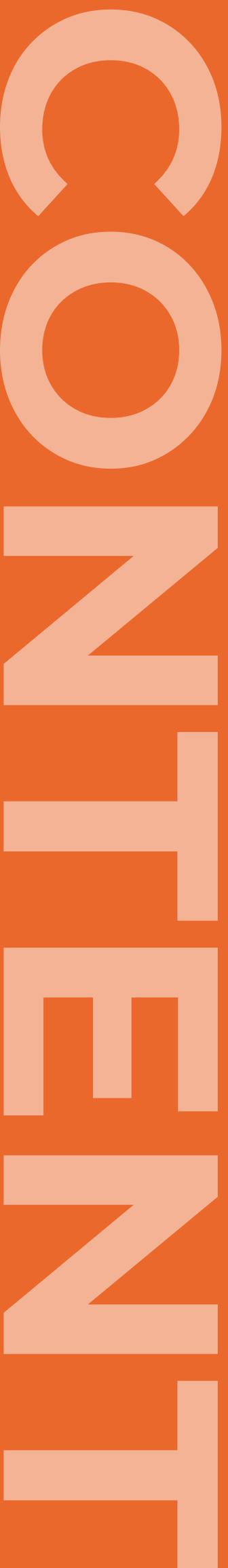
### CHINA INNOVATION RESEARCH & TREND WATCHING

We deliver data-backed, culturally informed research that decodes Chinese innovations, business models, consumer behavior, and market dynamics. Our clients include HSBC, Johnson & Johnson, Crocs, Adobe, and others.

### CONSULTING & EXPERT DIALOGS

We offer one-on-one consultations with industry insiders and thought leaders embedded in China's fast-moving innovation ecosystem. Whether you need guidance on platform strategy, technology benchmarking, or navigating competitive dynamics, we connect you with the right expertise at the right time. We've provided strategic insights to brands such as Colgate-Palmolive, DFS, and Planet.

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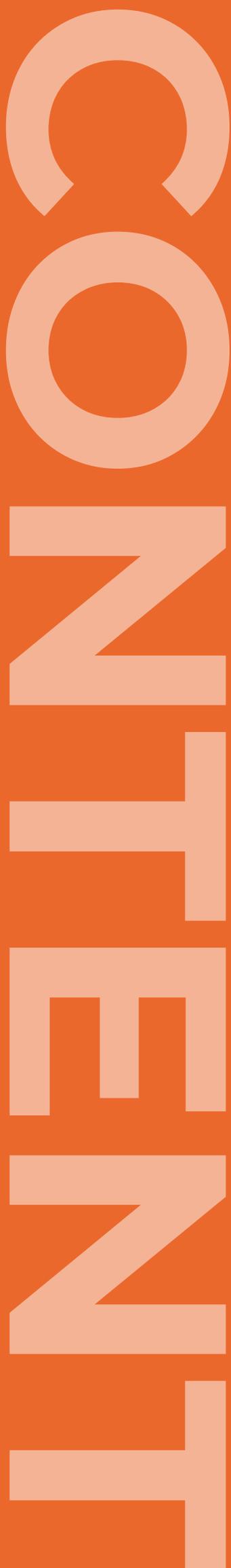
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# HELLO!

In 2025, China continued to redefine the boundaries of innovation. From the sustained rise of tech giants reshaping global digital infrastructure to the rapid emergence of AI-native startups, robotics leaders pushing automation into new frontiers, and EV makers accelerating the future of mobility, this was a market moving at unprecedented speed.

As we move into 2026, the momentum is only accelerating. This year will be shaped by deeper AI agent integration, intensifying competition, and a new wave of companies scaling breakthroughs from labs to the streets. Now is the time to understand who led in 2025 — and who is best positioned to win in the years ahead.

This report is your guide to the companies shaping China's innovation landscape. We profile 25 of the most impactful players across technology, artificial intelligence, robotics, electric vehicles, and digital ecosystems, giving you a clear view of where the momentum is heading and what comes next.

Thank you for joining us on this journey. Let's go get them!



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# Introduction

## TOP 12 CHINA CONSUMER TRENDS IN 2026

Introduction: China's Consumers in  
Cautious Transformation

Why China Shapes Global Consumer  
Trends

# TOP 12 CHINA CONSUMER TRENDS IN 2026

## 1

China's consumers are entering 2025 in a state of cautious transformation, balancing frugality with new forms of indulgence. After years of rapid expansion, economic headwinds and a sluggish pandemic recovery have made shoppers more selective in their spending. Households are saving at historically high rates and carefully weighing each purchase, especially big-ticket items, amid concerns over job security and the property market.

Yet beneath this caution lies a resilient willingness to spend on what truly matters. In fact, retail sales in key categories are rebounding – from food (up 12% in early 2025) to electric vehicles (37.2%) – as consumers “move on” and resume spending in areas aligned with their values and needs. Travel has roared back (domestic trips in H1 2025 up 18% vs 2019) and outbound flights even exceeded pre-pandemic levels.

In short, China's consumption-driven economy is entering a “new reality”: moderate overall growth with structural shifts in what people buy and how they buy it.



# 2

## WHY CHINA SHAPES GLOBAL CONSUMER TRENDS

China is not just the world's second-largest consumer market; it's a bellwether for emerging consumer behaviors. Several factors give China outsized influence in setting global trends:

### SCALE AND SPEED

With over 1.4 billion consumers – including the largest Gen Z cohort on the planet – China's trends immediately affect a massive market. Its digital ecosystem enables innovations to scale up at lightning speed.

### DIGITAL ECOSYSTEM & INNOVATION

China's hyper-digital lifestyle (from super-apps to cashless payments) means consumers readily embrace new tech-driven experiences. Concepts like OMO (online-merge-offline) retail – once novel – are now standard, as Chinese retailers perfect seamless integration of e-commerce, social media, and stores.

Chinese tech giants (Alibaba, Tencent, ByteDance) pioneer models in social commerce, live streaming, and AI-driven personalization that global brands later adopt. In short, China often prototypes the future of retail.





## CULTURAL CONFIDENCE & CREATIVITY

A wave of cultural pride (Guochao 国潮) has spurred Chinese consumers to celebrate local heritage and innovation, fueling trends unique to China that increasingly resonate globally. From Chinese luxury designers to C-beauty brands and even entertainment IPs, China's cultural exports are growing.

For example, the animated film "Chang An" (2023) reimagined Tang Dynasty poetry and was viewed by over 20 million people, showcasing how local content can captivate audiences far beyond China. International brands are taking note and collaborating with Chinese artists and museums to align with this cultural momentum.

## CONSUMER SOPHISTICATION

Chinese consumers are among the most discerning and well-informed in the world. They research products deeply, demand both quality and storytelling, and rapidly experiment with new ideas.

This combination of high standards and openness to change makes China a crucible for trend evolution. Companies that win in China must excel at innovation, localization, and agility, capabilities that then give them an edge globally.

In essence, China shapes global trends because it sits at the nexus of massive scale, digital-first innovation, and cultural renaissance. Watching China's consumers today offers a glimpse of where global consumer preferences are heading – from how we incorporate AI into daily life to how we seek meaning in our purchases.

# 01

## TREND 1 — AI SCENARIO POWER: HOW AI SHAPES DAILY LIFE & RETAIL JOURNEYS

AI Assistants & Routine Optimization

AI-Driven Retail, Content & Service

AI as Lifestyle Partner

Signals in the Market

Implications for Brands

# TREND 1 —

# AI IN DAILY LIFE: MAKING SHOPPING & ROUTINES SMOOTHER

In China, AI has moved from back-end infrastructure to visible, everyday companion. By 2026, AI is embedded in how people search, shop, work, learn, and entertain themselves. Consumers increasingly expect journeys where AI quietly handles the heavy lifting – from planning trips to curating products – while they focus on decisions and experiences.

## 1.1

### AI ASSISTANTS & ROUTINE OPTIMIZATION

General AI assistants and voice agents are becoming "super portals" for daily life. By late 2025, China's generative AI user base hit 602 million, powered by models like Doubao, Tongyi Qianwen and DeepSeek (Doubao's DAU topped 100 million). Integrated into apps and devices, these agents are shifting from simple chat to task execution loops.

Typical uses now include:

- ✓ Planning weekend trips, comparing routes, and booking transport and hotels.
- ✓ Summarizing long documents and emails, drafting reports, or organizing study notes.
- ✓ Optimizing routines: suggesting commutes, creating meal plans, managing calendars.

Roughly half of Chinese consumers already use AI assistants daily, with smart speakers, in-car systems, and smartphone assistants acting as always-on concierges.

# 1.2

## AI-DRIVEN RETAIL, CONTENT & SERVICE

In retail, AI operates both visibly and behind the scenes:

### AI RECOMMENDATIONS

E-commerce platforms rely on AI recommendation engines that interpret behavior and even inferred mood to surface highly likely-to-convert products.

### CONTENT COMMERCE

Short-video platforms like Douyin blend content and commerce so tightly that product discovery feels like entertainment, powered by constant algorithmic tuning.

### VIRTUAL KOLS

Virtual KOLs – fully digital influencers – form a fast-growing market, used for live streams, product demos, and 24/7 fan engagement.

### MARKET GROWTH

Virtual KOLs (AI-generated brand ambassadors) are a booming market that hit \$6.9B in China in 2025. These digital avatars engage fans 24/7, powering brands' livestreams, customer service and even product launches.

Offline, AI enables cashierless convenience stores, smart mirrors with styling suggestions, and early-stage service robots in showrooms. Predictive commerce pilots at platforms such as JD.com and Alibaba test AI that anticipates needs, pre-stocks local warehouses, and nudges customers toward frictionless, almost automatic purchasing.

In parallel, virtual idols and AI-generated influencers are becoming a mainstream part of this AI commerce stack. Over 60% of Chinese internet users follow virtual idols, and thousands of companies have invested in virtual-KOL initiatives; in some campaigns, virtual influencers deliver around three times higher engagement than human KOLs.



# 1.3

## AI AS LIFESTYLE PARTNER

Crucially, AI is being embraced as a coach and co-creator, not just a productivity tool. Consumers turn to AI-enabled fitness apps that count reps via camera, track form, and adapt training plans. Language apps deploy AI tutors for on-demand conversation practice. Creators use AI image and music generators to experiment with art, design, or remixing.

For many, AI literacy is a subtle status marker: being good at prompting an ERNIE-like model or using creative tools signals being “in the know.” Gen Z in particular shows low fear and high curiosity, and expects brands to make services feel smarter: an AI stylist that instantly assembles outfits or virtually tries them on is now baseline, not sci-fi.



# 1.4

## SIGNALS IN THE MARKET

### GENAI MAINSTREAMING

Rapid growth in generative AI usage and integration into mainstream platforms and devices.

### AI COMMERCE EXPANSION

Expansion of AI-powered recommendation, virtual influencers, and predictive commerce in retail.

### PERSONAL AI TOOLS

Rising use of AI in personal improvement domains: fitness, education, creativity, and time management.

# 1.5

## IMPLICATIONS FOR BRANDS



### USE AI TO UPGRADE CORE OPERATIONS

personalization, inventory forecasting, and customer service must feel intelligent and responsive, not generic.



### TREAT AI AS A NEW ENGAGEMENT MEDIUM

build AI stylists, coaches, or branded chat personas that add value and personality, not just answer FAQs.



### DESIGN FOR “AI SEO”

ensure products and content are structured so AI assistants can easily recommend your brand when users ask for help.



### AI CO-CREATION

Co-create with consumers using AI tools (flavor generators, design helpers, scenario planners) to deepen participation.



### BE TRANSPARENT AND ETHICAL

clearly explain data use, keep human oversight in sensitive areas, and position AI as enhancing, not exploiting, user data.

In an AI-augmented China, brands that combine smarter journeys with real human insight will stand out – and those that feel “dumb” or opaque will quickly be left behind.

# 02

## TREND 2 — LESS BUT BETTER: PAY ONLY FOR HIGH QUALITY GOODS

Smart Upgrading vs.  
Over-Consumption

Key Purchase Triggers:  
Durability, Trust, Proof

“Less but Better” in Action

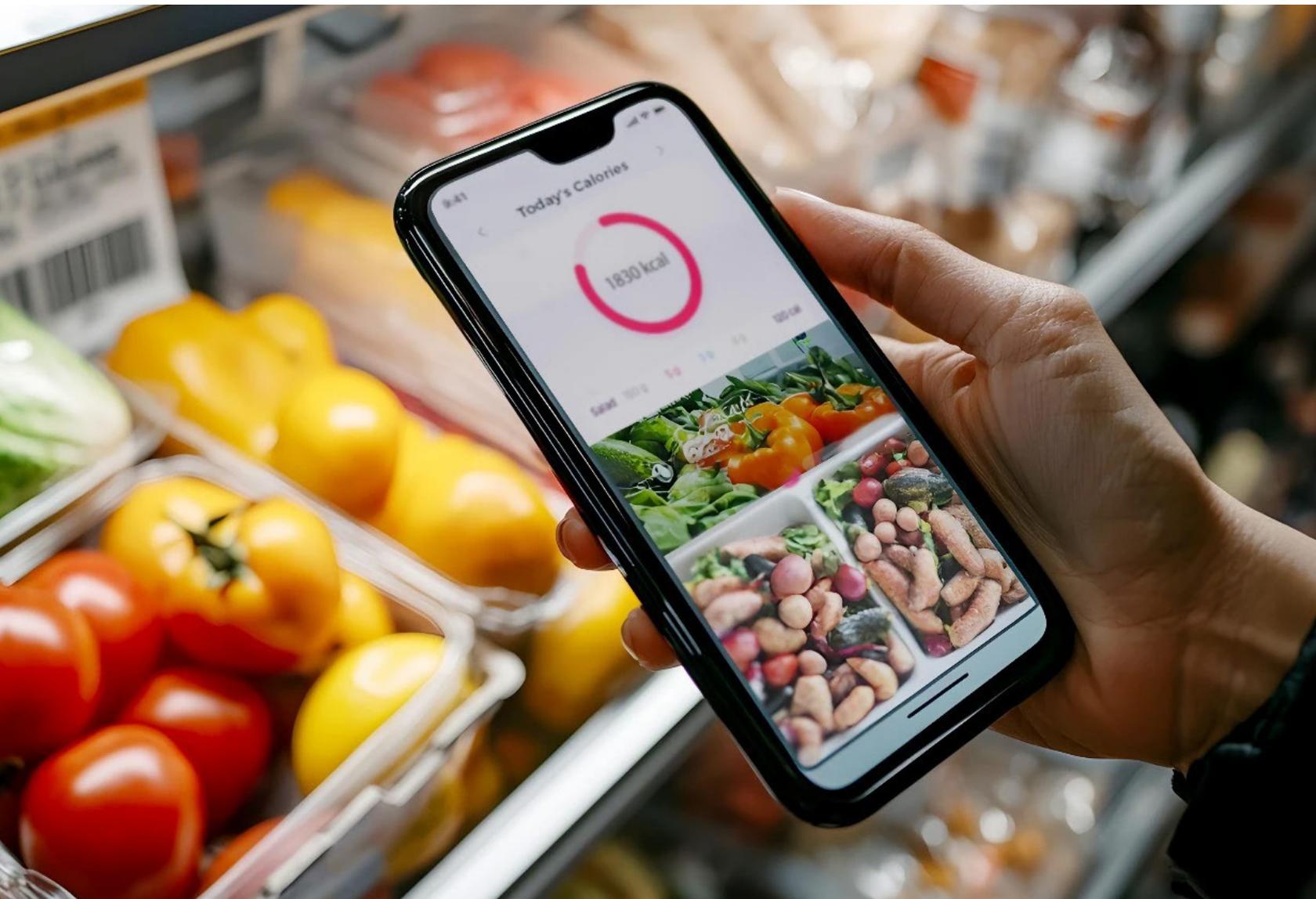
Signals in the Market

Implications for Brands

## 02

## TREND 2 — LESS BUT BETTER: PAY ONLY FOR HIGH QUALITY GOODS

Gone are the days of mindless “upgrade” fever. Chinese consumers have entered a value-for-value era, embracing a “less but better” philosophy across categories. They still want to improve their lives, but only by paying more when a product is demonstrably better — in performance, durability, safety, or design. Quantity is out; precision in quality is in.



# 2.1

## SMART UPGRADING VS. OVER-CONSUMPTION

Rather than accumulating goods, consumers are meticulously curating what they own. In fashion, they are trading frequent fast-fashion hauls for a smaller capsule wardrobe that lasts longer and feels more timeless.

In tech, they hold on to devices for longer and upgrade only when there is a clear leap in camera, battery, or functionality. The underlying mindset is pragmatic: upgrading should be targeted and meaningful, not just about owning the latest version.

# 2.2

## KEY PURCHASE TRIGGERS: DURABILITY, TRUST, PROOF

The triggers for “buying better” have shifted, with three factors standing out:

✓ **Durability and reliability:** Products seen as built-to-last — from home appliances to furniture and everyday basics — gain appeal because they spread cost over time.

✓ **Brand trust and transparency:** Consumers rely on peer reviews, testing reports, and transparent disclosure of ingredients or materials to assess the credibility of claims.

✓ **Evidence of superiority:** Premium brands are expected to demonstrate why they cost more through certifications, scientific data, or side-by-side comparisons that make performance differences visible.

If a higher price tag cannot be backed up with tangible proof, many shoppers now default to the mid-range alternative.

## 2.3

### “LESS BUT BETTER” IN ACTION

This ethos can be seen across multiple sectors:

#### FOOD AND BEVERAGE

People talk about “drinking less, but better” — choosing smaller volumes of higher-quality, healthier, or more distinctive drinks instead of large quantities of sugary or generic options.

#### ALCOHOL

Overall consumption may soften, but interest in craft beers, fine wines, and low- or no-alcohol offerings rises as consumers look for richer taste and more mindful experiences.

#### VALUE RETAIL

The expansion of membership clubs and discount chains, such as HotMaxx (with about 954 stores by end-2025) illustrates how shoppers seek branded, higher-quality goods at bargain prices.

At the same time, traditional luxury faces a new reality: top prices are only tolerated when craftsmanship, materials, after-sales, or heritage clearly stand above the rest.

## 2.4

### SIGNALS IN THE MARKET

#### EXTENDED REPLACEMENT CYCLES:

Longer replacement cycles in tech and durable goods as consumers wait for meaningful improvements.

#### VALUE CHANNELS OUTPERFORM

Stronger performance of quality/value channels (outlets, warehouse, and membership clubs, off-price retail) relative to generic mid-tier options.

#### INFORMED PREMIUM ACCEPTANCE

Increasing attention to product specs, ingredients, and third-party tests before consumers accept a premium positioning.

# 2.5

## IMPLICATIONS FOR BRANDS

To thrive in the value-for-value era, brands must earn their premiums rather than assume them. That means:



### INVESTING IN REAL PRODUCT QUALITY

Better materials, more robust construction, user-centric design, and rigorous testing so that improvements are felt in everyday use.



### MEMBERSHIP WAREHOUSE CLUBS ARE ACCELERATING

Sam's Club China had about 61 clubs in 2025, while Walmart China said 2025 will be its busiest expansion year, with 10 new Sam's Club stores planned. Financially, the chain's membership fee income surged 40% year-on-year in 2025, with total paid members exceeding 10.7 million and driving over RMB 140 billion in annual sales. Looking ahead, Walmart China officially announced in January 2026 its plan to open 13 new Sam's Club stores across 10 cities.



### COMMUNICATING PROOF, NOT JUST IMAGE

Use data, certifications, before/after results, and explicit comparisons to show how your product outperforms cheaper alternatives.



### BUILDING CLEAR VALUE LADDERS

Structure pricing and ranges so that each step-up has obvious, understandable benefits — longer life, better experience, superior performance.

Additionally, brands must be ready for highly informed, semi-professional consumers who will scrutinize details and share their findings publicly. Radical transparency, consistent quality, and honest claims are now prerequisites. Those who genuinely champion “less but better” — and can demonstrate it — will win long-term loyalty and retain the right to charge more in an increasingly skeptical market.

# 03

## TREND 3 — RATIONAL + EMOTIONAL SPENDING: BALANCING UTILITY & JOY

Rational Everyday Spending: Discipline  
in the Basics

Protected Emotional Spending:  
Experiences and Self-Investment

Micro-Joys: Small Purchases, Big  
Emotional Payoff

Signals in the Market

Implications for Brands

# TREND 3 —

## RATIONAL + EMOTIONAL SPENDING: BALANCING UTILITY & JOY

- Consumers are cutting back on routine, low-meaning spend while protecting budgets for emotionally essential categories.
- Micro-joys and “safe indulgences” grow even in a cautious economy, alongside bigger experiences and self-investment.
- Brands sitting in the “grey middle” — neither a wise value choice nor an emotionally resonant splurge — are most at risk.

Chinese consumers in 2026 are not simply “trading down” or “bouncing back.” They are reallocating. On one side, they are sharply rational in everyday spending: cutting non-essential outlays, comparing prices, and prioritizing practical value.

On the other side, they are willing to spend generously on purchases that deliver emotional meaning, relief, or self-development. This coexistence of frugality and indulgence defines China’s new consumer psyche and underpins many of the other trends in this report.

### Trends 9 and 6 zoom in on this mindset:

#### TREND 9 “SOUL NOMADS”

looks at large-scale emotional escapes (travel, events, healing experiences).

#### TREND 6 BOOST DAILY CONSUMPTION TASTE

looks at micro-rituals and daily micro-joys that make ordinary life feel special.

Together, they express the same “rational emotionalist” logic.

# 3.1

## RATIONAL EVERYDAY SPENDING: DISCIPLINE IN THE BASICS

Economic uncertainty, job pressure, and a long period of cautious sentiment have made households very deliberate about money. In daily life, many have reduced restaurant visits, impulse purchases in fashion or beauty, and overseas travel.

They lean more on groceries, home cooking, discount formats, and membership-based retail, which stretch each yuan further. Routine categories are evaluated on necessity, durability, and efficiency: if a product doesn't materially improve life, it is easily downgraded or dropped.

# 3.2

## PROTECTED EMOTIONAL SPENDING: EXPERIENCES AND SELF-INVESTMENT

At the same time, consumers defend and sometimes increase budgets for what feels emotionally essential. This includes:

- ✓ Domestic travel, weekend getaways, “niche” destinations, concerts, and live events are seen as essential decompression.
- ✓ Fandom-related activities and cultural experiences that create shared memories and social content.
- ✓ Self-investment categories such as fitness memberships, hobby studios, and online courses are framed as “upgrading myself.”

The mental calculation is: I will save on things that don't matter, so I can spend on the things that keep me going.

## 3.3

### MICRO-JOYS: SMALL PURCHASES, BIG EMOTIONAL PAYOFF

Alongside bigger experiences sits a dense layer of small emotional treats, especially for younger consumers:

- Blind-box toys, character merchandise, IP collectibles, and cute stationery.
- Premium bubble tea, specialty desserts, small accessories, and cozy home décor.

These are low-risk, high-feel-good purchases. A ¥30–¥60 (\$4.25–\$8.50) treat can offset a tough week and provide something visually shareable. The internal logic: It's not expensive, and it makes my day better.

(Trend 6 will zoom deeper into these micro-rituals and aesthetics; here they illustrate how emotional value is layered on top of disciplined budgeting.)

## 3.4

### SIGNALS IN THE MARKET

#### EVERYDAY SPENDING IS BECOMING MORE DISCIPLINED:

greater use of discount platforms, warehouse clubs, community group-buys, and “good enough” options for routine needs.

#### EXPERIENCE AND SELF-INVESTMENT BUDGETS ARE BEING DEFENDED:

strong demand for domestic travel, events, and learning or wellness services despite macro caution.

#### MICRO-JOY CATEGORIES CONTINUE TO GROW:

small-ticket, emotionally rich items play an outsized role in how consumers manage stress and reward themselves.

# 3.5

## IMPLICATIONS FOR BRANDS

The most significant risk is being neither cheap enough to feel like a smart routine choice nor emotionally compelling enough to warrant a splurge. Consumers are effectively asking two questions before buying:

Is this a wise use of my limited budget?

Does this genuinely make my life feel better?

Brands should respond by:



### ENGINEERING DUAL VALUE

Pair clear rational benefits (value-for-money, quality, health, efficiency) with clear emotional benefits (joy, comfort, identity, belonging) in every proposition.



### DESIGNING “SAFE INDULGENCES”

Use formats, price points, and narratives that make emotional purchases feel controlled and justified — such as entry sizes, bundles, or “treat yourself” / “invest in yourself” framing.



### ANCHORING IN OCCASIONS AND COMMUNITIES

Tie products to specific emotional moments (weekend reset, travel ritual, self-care night, fandom drop) and amplify them via social and community touchpoints.

Brands that help consumers justify with logic and indulge with heart are the ones most likely to be invited into their protected spending portfolio in this cautious, emotionally-driven era.

# CHINA INNOVATION TOURS

CURIOUS ABOUT WHAT'S NEXT?  
COME SEE IT FIRSTHAND.

This report gives you the names. Our tour put you in the room. Visit China's top tech companies. Experience the technology up close. Sit down with the leaders and experts driving real breakthroughs.



**EMAIL US TO DISCUSS  
A TAILORED TOUR FOR  
YOUR TEAM**



# 04

## TREND 4 — PRACTICAL GREEN PURCHASING: ECO-FRIENDLY & NO WASTE

Sustainability as a Mainstream Filter,  
Not a Niche

Green Pragmatism: Eco, But Make It  
Cost-Effective

The Rise of Circular & Low-Waste  
Retail

Signals in the Market

Implications for Brands

# TREND 4 —

## PRACTICAL GREEN PURCHASING: ECO-FRIENDLY & NO WASTE

Chinese consumers in 2025–26 are not “eco idealists” willing to pay any price for green – they are green pragmatists. Sustainability has moved from niche to mainstream, but it is filtered through the same value-for-money, quality, and emotional logic that drives other choices.

People prefer products that are eco-friendly, low-waste, and energy efficient – as long as performance and total cost still make sense. Green is now a default expectation in many categories, yet greenwashing and overpriced “halo products” are quickly penalized.

### 4.1

## SUSTAINABILITY AS A MAINSTREAM FILTER, NOT A NICHE

Surveys show that sustainability is now a core buying filter for many Chinese consumers, especially younger cohorts. One recent Daxue Consulting–cited analysis found that around 40% of Chinese consumers now prioritise eco-friendly products, and an estimated 90% of Gen Z shoppers actively seek recyclable or sustainable options when they can.

Asia-Pacific consumer work from PwC likewise reports that roughly half of respondents are buying more sustainable products and that over 40% are more considerate of overall consumption after recent economic and geopolitical shocks.

China’s “dual carbon” agenda (emissions peaking before 2030, carbon neutrality by 2060) adds a policy tailwind, as media, platforms, and brands reinforce carbon and resource awareness. At the same time, consumers are practical. Sustainability is less about virtue signalling and more about “smart, responsible living”: reducing waste, avoiding toxic ingredients, lowering energy bills, and feeling that daily choices are aligned with a better future.

## 4.2

### GREEN PRAGMATISM: ECO, BUT MAKE IT COST-EFFECTIVE

The dominant mindset is eco + 性价比高 (high value for money). Chinese consumers will choose greener options when:

- Performance is equal to or better than
- Total cost of ownership is acceptable or lower
- Claims are backed by clear, verifiable proof

The EV market is a perfect example. Electric vehicles have gone from niche to mainstream: in 2025, they made up 50.8% of China's new-car sales, with over 20 million charging facilities nationwide. This isn't just idealism; it reflects better drives, lower costs, widespread charging, and solid policy perks. When green is cheaper and easier, adoption naturally speeds up.

At the household level, consumers gravitate to:

#### ENERGY EFFICIENCY

Energy-efficient appliances that cut electricity bills

#### LOW-WASTE PACKAGING

Low-waste packaging and refill formats that reduce clutter and cost

#### LOCAL SOURCING

Local sourcing and shorter supply chains that feel both safer and greener

They are skeptical of “green premiums” that lack tangible benefits; eco-positioning must sit atop the same Quality Precision logic as any other upgrade.



## 4.3

### THE RISE OF CIRCULAR & LOW-WASTE RETAIL

Circular and low-waste models fit this green + thrift equation perfectly. Several formats are scaling fast:

#### NEAR-EXPIRY AND SURPLUS DISCOUNT CHAINS

Soft-discount players such as HotMaxx offer branded goods (dairy, snacks, household items) at 30–50% below standard prices by focusing on near-expiry, surplus, and overstock inventory. For consumers, this feels like a triple win: brand quality, rock-bottom pricing, and less food waste.

#### RESALE, TRADE-IN, AND REFURBISHMENT

Fashion and electronics resale, outlet ecosystems, and official trade-in programs (for smartphones, appliances, even cars) are gaining traction as socially acceptable, smart consumption, not a sign of hardship.

In essence, circular formats are being reframed as intelligence and responsibility, not sacrifice. Consumers like the idea that they are saving money, rescuing products from waste, and “doing the right thing” in one move.

## 4.4

### SIGNALS IN THE MARKET

#### CARBON LABELS

Sustainability metrics are now standard in many brand and marketplace product pages (carbon labels, eco-certifications, recyclability icons).

#### GREEN TECH ADOPTION

EVs, heat pumps, energy-efficient appliances, and smart home devices see structural adoption, not just campaign spikes, as consumers respond to both bills and climate messaging.

#### CIRCULAR DISCOUNT MODEL

Discount chains like HotMaxx and bulk-snack formats expand into lower-tier cities, using circular sourcing (near-expiry, surplus) as a core business model.

#### CLUB GROWTH

Membership clubs such as Sam’s Club continue aggressive expansion and retain members at high rates, signalling a sustained appetite for curated value and efficiency.

# 4.5

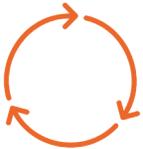
## IMPLICATIONS FOR BRANDS

For brands, this trend is not about adding a small “green” line; it’s about baking eco-value into mainstream offers in a way that survives scrutiny from Insider communities and Deep Trust dynamics:



### ECO-UPGRADE YOUR HERO SKUS

Prioritise lower-energy, lower-waste, safer formulations in your core products (not just niche “eco” sub-lines). Make sure improvements are measurable, such as % energy saved per cycle, % recycled material, and packaging weight reduction.



### DESIGN CIRCULAR FLOWS

Explore resale, buy-back, refill, repair, or “near-expiry specials” that let consumers feel competent and responsible. For FMCG, partnering with discount and near-expiry channels can turn potential write-offs into visible circular stories.



### CONNECT ECO TO QUALITY PRECISION

Frame sustainability as part of overall product superiority: better longevity, better ingredients, lower lifetime cost. Avoid vague “green” language without proof; Insiderism-driven consumers will dissect your claims.



### USE POLICY AND PLATFORMS AS ACCELERANTS

align with China’s dual-carbon agenda, participate in platform-run green initiatives (such as tree-planting and low-carbon badges), and use credible third-party certifications to reinforce trust.



### REPORT AND COMMUNICATE LIKE AN ENGINEER, NOT A PR TEAM

Provide clear, concise eco KPIs (CO<sub>2</sub> saved, waste avoided, recycled shares) in channels where Insider consumers gather (Xiaohongshu, Bilibili, brand FAQs).

Brands that treat green as a value-for-value enhancer – not a soft CSR add-on – will be best positioned to win the budgets of China’s green pragmatists and secure a durable edge as regulations and consumer expectations tighten.

# 05

## TREND 5 — TARGETED WELLNESS: DATA-DRIVEN PROACTIVE HEALTH CARE

Personalized Health Tech Boom

Proactive and Preventive Mindset

Wellness as Identity & Community

Signals in the Market

Implications for Brands

# TREND 5 —

## TARGETED WELLNESS: DATA-DRIVEN PROACTIVE HEALTH CARE

- Health moves from a vague aspiration to a measurable, data-driven life project.
- Consumers combine devices, diagnostics, and content to manage both body and mind proactively.
- Wellness brands must deliver real, trackable benefits and handle data and claims with extra care.

Trend 5 is where Insiderism (Trend 8) meets one of the highest-stakes domains: health. Chinese consumers are turning wellness into a long-term, data-informed strategy, tracking everything from sleep and steps to mood, diet, and biomarkers.

### 5.1

#### PERSONALIZED HEALTH TECH BOOM

China's wellness market is full of gadgets and apps that turn the body into a dashboard. Urban consumers adopt:

- ✓ Wearables (fitness trackers, sleep rings, smart scales, portable ECGs).
- ✓ AI-enhanced services such as DNA-based diet tests and microbiome kits offering personalized nutrition guidance.
- ✓ AI assistants are used daily (around half of Chinese consumers) to manage routines, sleep, diet, and workouts.

People count steps, track macros, log moods, and adjust routines — sleeping earlier after bad sleep scores, dialing back workouts based on recovery metrics. Many are effectively treating their bodies as projects with KPIs.

## 5.2

### PROACTIVE AND PREVENTIVE MINDSET

The pandemic made “don’t wait until it’s serious” a shared lesson. Younger consumers, in particular, are investing earlier and more broadly:

#### LONGEVITY SUPPLEMENTS

Supplements and nootropics for long-term brain and body health.

#### PREVENTIVE SCREENING

Regular health screenings and check-ups.

#### MINDFULNESS PRACTICES

Mental health practices: meditation apps, sound therapy, yoga, temple, or nature retreats.

Wellness now firmly includes emotional balance. One survey found 46% of Gen Z say “emotional consumption” (spending on anxiety-relieving experiences) helps them manage stress, and 56% are willing to spend on products that bring emotional comfort.

At the same time, functional foods and beverages are booming: protein-fortified snacks, TCM-based herbal teas, low-GI staples, energy drinks, and sugar-free teas – all part of a shift toward healthier daily choices.

## 5.3

### WELLNESS AS IDENTITY & COMMUNITY

Staying healthy has become an identity marker and social currency. It’s normal to post running mileage, gym check-ins, or healthy recipes on social media. Douyin hosts countless wellness challenges: sunrise running groups, flexibility “stretching girl” videos, and group fitness content.

Gyms and boutique studios (spinning, HIIT, yoga) are thriving as social spaces as much as workout venues. Workplaces and schools are leaning in with wellness days, mindfulness programs, and fitness initiatives, backed by government goals to increase national fitness.

Many young Chinese now describe themselves in hybrid identity terms: “I’m a coder and a marathoner,” “I’m in finance and eat low-carb,” signaling wellness as part of who they are.

# 5.4

## SIGNALS IN THE MARKET

### AI HEALTH TRACKING

Rising penetration of wearables, health-tracking apps, and AI-based wellness services.

### EMOTIONAL WELLNESS TOOLS

Growth in meditation apps, yoga studios, and emotional comfort products (journaling tools, aromatherapy, sleep aids).

### SPORTS ECONOMY

In an H1 2025 summary, gov.cn reported that more than 500 surveyed sports events generated roughly RMB 30 million (about US\$4.2M) in related consumption per event on average. This frames sports events as repeatable drivers of local spending.

### HEALTHIER F&B

Substantial shift in F&B toward functional, low-sugar, and “better-for-you” offerings.

### GROUP WELLNESS

Expansion of wellness-related communities, challenges, and employer/university programs.

# 5.5

## IMPLICATIONS FOR BRANDS



### WELLNESS INTEGRATION

Integrate clear wellness value into products: functional benefits, stress relief, or support for healthier routines.



### PERSONALIZED DIAGNOSTICS

Use diagnostics and personalization where possible, including skin analyzers, nutrition quizzes, and environmental sensors. To provide tailored recommendations.



### PRIVACY & VALIDATION

Treat data privacy and accuracy as non-negotiable: be transparent on data use and seek credible validation, such as from medical or research partners).



### COMMUNITY WELLNESS

Build wellness communities and challenges tied to your brand (virtual runs, habit streaks, reward schemes for healthy actions).



### CUSTOMIZABLE PLANS

Offer personalization options: customizable supplement packs, adjustable health plans, or product variants tuned to sensitivities or goals.

Brands that help consumers measure, understand, and tangibly improve their well-being will not just sell products – they'll become long-term partners in people's "best self" projects.

# 06

## TREND 6 — VALUE PACKAGING & MICRO RITUALS: BOOST DAILY CONSUMPTION TASTE

Mini Ceremonies & Daily Sparkle

Packaging Delight & Aesthetic  
Consumption

Micro-Luxuries & Small Indulgences

Signals in the Market

Implications for Brands

# TREND 6 —

## VALUE PACKAGING & MICRO RITUALS: BOOST DAILY CONSUMPTION TASTE

- Whereas Trend 9 focuses on big escapes, Trend 6 zooms in on daily life: micro-rituals, aesthetics, and affordable luxuries.
- Consumers use small, repeatable acts and “beautiful things” to make the ordinary feel memorable and shareable.
- Design, packaging, and tiny upgrades can shift a brand into the “highlight of my day” zone.

If Trend 9 is about big, occasional escapes, Trend 6 is about small, everyday elevations. Chinese consumers, especially younger ones, embrace the mantra “生活需要仪式感” – life needs a sense of ritual. They inject little ceremonies and aesthetic touches into daily routines to regain control and joy without significant spending.



# 6.1

## MINI CEREMONIES & DAILY SPARKLE

Busy urbanites are carving out brief, intentional rituals that make routine tasks feel special and under control. A simple breakfast might be plated like a café dish; a solo evening might start with lighting a favorite candle; a delivery becomes an “occasion” because the packaging and unboxing are thoughtfully designed.

Common micro-rituals include:

- ✓ Brewing hand-pour coffee instead of instant as a morning reset.
- ✓ Treating a multi-step skincare routine as a nightly spa moment.
- ✓ Planning #OOTD outfits around moods, themes, or specific events.

These are small, repeatable acts that create structure and emotional grounding without requiring much time or money.

# 6.2

## PACKAGING DELIGHT & AESTHETIC CONSUMPTION

Brands have responded by making presentation a core part of the value proposition. Attractive, creative, even collectible packaging is now a powerful purchase trigger. Consumers seek items that are “good-looking enough to post,” such as:

### ART BOTTLE DESIGNS

Tea or liquor bottles designed as art objects.

### MOTIF COSMETIC COMPACTS

Cosmetic compacts with traditional Chinese motifs.

### REUSABLE MOONCAKE BOXES

Luxury mooncake boxes that double as jewelry cases or keepsake tins.

On platforms like Xiaohongshu and Douyin, these aesthetically pleasing items become viral objects of desire. Even “useless but beautiful” items — figurines, quirky candles, vintage-style diaries — are justified if they spark joy or signal taste.

## 6.3

### MICRO-LUXURIES & SMALL INDULGENCES

Trend 3 established that consumers protect budgets for emotionally meaningful spending. Trend 3 focuses on the smallest unit of that protected spend: micro-luxuries that slot easily into the week:

#### ARTISAN SINGLE TREAT

A single artisan drink or dessert.

#### ENTRY-LEVEL LUXURY

Entry-level luxury items (lipsticks, travel-size fragrances, small leather goods).

#### DESK & BAG UPGRADES

Specialty stationery, décor, or accessories that upgrade a desk, shelf, or bag.

The impact for brands is that even low-ticket SKUs can carry high emotional weight — if they feel premium, personal, and photographable.

## 6.4

### SIGNALS IN THE MARKET

#### RITUAL AESTHETIC CONTENT

Increasing volume of “ritual” and “aesthetic” content: morning/evening routines, desk and home corners, unboxing posts.

#### DISTINCTIVE REUSABLE PACKAGING

Substantial investment by brands in distinctive, reusable, or collectible packaging and seasonal visual themes.

#### AESTHETIC MICRO-PLEASURE GROWTH

Growth in small-ticket categories that trade primarily on aesthetics and micro-pleasure rather than pure utility.

# 6.5

## IMPLICATIONS FOR BRANDS

To tap this trend, brands should:



### DELIGHT IN THE DETAILS

Treat unboxing and first use as experiences, with thoughtful touches like inner messages, free stickers, or reusable containers.



### RITUAL DESIGN

Provide simple, guided ways to turn use into a repeatable ceremony (a 5-minute mindful coffee break, a weekly self-care bath night).



### PREMIUMIZE THE SMALL

Highlight entry products (perfumes, minis, accessories, limited snacks) as “everyday luxury” lines that are accessible yet special.



### USE SEASONAL AND CULTURAL HOOKS

Create limited offerings tied to festivals or seasons – Sakura-themed spring drinks, Qixi self-love gift sets – to anchor new rituals.

Brands that credibly support this need for emotional escape and recovery can become part of consumers’ ongoing “soul maintenance” plans, not just one-off purchases.

# 07

## TREND 7 — ICE & SNOW ECONOMY: ALL YEAR ROUND BOOM

All-Round Accessibility

Consumer Trends

Mix & Tech Boost

Signals in the Market

Implications for Brands

# TREND 7 —

## ICE & SNOW ECONOMY: ALL YEAR ROUND BOOM

China's ice and snow economy is no longer just a winter thing for northerners—it's a year-round, nationwide hit loved by all in 2026. With policy support and tech sprucing it up, this once "cold resource" has become a red-hot consumption trend, with fun, diverse experiences drawing people from everywhere, even overseas.



# 7.1

## ALL-ROUND ACCESSIBILITY

✓ **Consumer Experience:** You don't need to travel to the north or wait for winter for snow fun—south China has rich options too, making ice and snow a daily leisure choice for everyone.

✓ **Regional Features:** Harbin, Altay and Chongli boast unique natural ski resorts; Shanghai, Chengdu and Shennongjia have popular indoor & outdoor snow venues with their own charms.

✓ **Year-Round Options:** Northern ski resorts extend business hours, southern spots run all year, and simulated skiing/roller skating are perfect for ice and snow newbies to start with.

# 7.2

## CONSUMER TRENDS

Post-95s are the core ice and snow consumers, making up nearly half of all ski bookings—they're obsessed with trendy design-driven ski resorts, night snow activities like light shows and music festivals, and snapping share-worthy photos in stylish ski wear that stands out on social media.

Family trips with kids are a total winter must-have: parents care most about kid-friendly perks like professional child care services, gentle snow tubing parks, and reliable safety gear for little ones, turning snow days into stress-free, cherished family memories.

More international tourists are flocking to China for ice and snow fun, with popular spots like Chongli and Altay drawing visitors from over 100 cities worldwide, making this trend truly global.

People's needs are totally different: newbies just want to have casual fun, trying light activities like snowmobiles or ice sculpture viewing while capturing cool shots to share; pro skiers chase steeper slopes, high-performance gear, and one-on-one coaching to level up their skills; wellness lovers swear by ski-and-spa combos, pairing thrilling runs with hot spring soaks and gentle TCM therapies to unwind.

# 7.3

## MIX & TECH BOOST

China's ice and snow economy is getting more creative with all kinds of "ice and snow +" blends, and local smart gear is getting way better too. A complete chain from gear making to venue operation and after-sales service has formed, with each region playing its strengths to make the whole experience awesome.

### SCENE FUSION

Brands create fun "ice and snow +" experiences with intangible heritage, local culture and study trips—each spot has its own unique charm, no boring sameness.

### SMART GEAR UP

Local ice and snow gear gets a tech upgrade; smart ski wear and AR goggles are super popular, and digital services make playing in the snow much easier.

### FULL INDUSTRY CHAIN

A complete industry chain covers gear production, venue running and food, accommodation & training—each part works well, with clear regional advantages.

# 7.4

## SIGNALS IN THE MARKET

### GROWING POPULARITY

2026 ice-snow season ski resort visits rise 10% YoY to 36 Billion RMB (5.06 billion USD) ; annual revenue is set to exceed 450 Billion RMB(65 billion USD), with gear market growing 30%+ YoY.

### NORTH-SOUTH HIT

Northern classic spots like Harbin and Chongli stay popular with unique natural snowscapes; southern venues in Shanghai and Chengdu thrive—fun covers the country, no regional favoritism.

### WHOLE CHAIN BOOM

Ice and snow gear (smart wear included), professional training, and peripheral food & drinks all boom; niche services like ski photography and gear rental gain more fans.

# 7.5

## IMPLICATIONS FOR BRANDS

Brands need to jump on the ice and snow trend, fit different people's needs, blend local culture and tech, and create fun cross-border experiences to win fans.



### TAILOR-MADE PRODUCTS

Create different products for newbies, pros and families, like parent-child ice and snow packages to match all kinds of consumption scenes.



### CULTURAL BLENDING

Mix local intangible heritage and trendy local culture into ice and snow products to make unique brand memories and avoid sameness.



### TECH BETTER EXPERIENCE

Launch smart ice and snow gear and digital services like AI ski tips and scan-to-rent gear to make the experience more convenient and fun.



### CROSS-BRAND COLLABS

Cooperate with tourism and wellness brands to create immersive experiences like ski-spa combos, and boost loyalty with private domain operations

# 08

## TREND 8 — INSIDERISM: TRUST REVIEWS NOT ADS

Knowledge is Power (and Influence)

Communities > Big Influencers

Credibility and Transparency Rules

Signals in the Market

Implications for Brands

# TREND 8 — INSIDERISM: TRUST REVIEWS NOT ADS

# 08

- Chinese consumers act like “category insiders”: they study ingredients, specs, origin, and data before buying.
- Trust is shifting from big celebrities and glossy ads to expert communities, KOCs, and deep-dive content.
- Brands must treat education, transparency, and community dialogue as core capabilities, not side campaigns.

trend 5/8/10 describe the full trust chain:

✓ **Trend 5 - Precision Wellness:** how this plays out in one of the most important verticals – health.

✓ **Trend 8 - Insiderism:** how consumers inform themselves and evaluate products across categories.

✓ **Trend 10 - Deep Trust Era:** what happens when brands consistently pass these tests and become part of a small, trusted set.

This trend focuses on the information and credibility infrastructure behind consumer decisions in China’s digital-first, community-driven environment.

# 8.1

## KNOWLEDGE IS POWER (AND INFLUENCE)

Today's consumer often knows as much about ingredients or specs as frontline staff. They actively research before buying and expect science, not slogans.

In beauty, this has fueled the rise of the 成分党 (ingredient sect): ingredient-savvy consumers who scrutinize labels and demand evidence-backed claims. Around 76.8% of beauty searches on Xiaohongshu are product-focused, as users compare formulations and efficacy rather than just looking for looks or trends.

The conclusion from large-scale content analyses is consistent: influence is no longer top-down; consumers are science-first and respond to deep education.

This pattern extends to other categories: tech forums where enthusiasts publish real-world tests, or parenting groups where mothers exchange research on baby nutrition. Shoppers don't just want to know what a product is; they want to see why it works and how it compares.

# 8.2

## COMMUNITIES > BIG INFLUENCERS

With information everywhere, credibility matters more than reach. Consumers rely heavily on:

### HONEST KOCS

KOCs (Key Opinion Consumers) and micro-influencers known for honest, detailed reviews.

### NICHE COMMUNITY HUBS

Niche forums, WeChat groups, and community chats where people share tests, photos, and problem reports.

### DEEP-DIVE PLATFORMS

Platforms like RedNote, Bilibili, and Douban that host long-form breakdowns and side-by-side comparisons.

Trust flow is shifting from:

### OLD MODEL

Brand → Celebrity/KOL → Consumer

## NEW MODEL

Brand ⇌ Expert / Enthusiast Community ⇌ Wider Consumers

Communities routinely challenge claims: they ask for ingredient lists, lab reports, before/after photos, and user evidence. Over-claims or hidden sponsorships are quickly called out and punished.

# 8.3

## CREDIBILITY AND TRANSPARENCY RULES

In response, serious brands are becoming more transparent and proof-oriented. Many now:

### DATA TRANSPARENCY

Publish lab test results or clinical trial data, especially in beauty, health, and tech.

### BETA CO-CREATION

Involve “insider” consumers in beta programs and openly solicit their feedback.

### R&D DIALOGUE

Host Q&A sessions with product managers or R&D staff, treating enthusiasts as partners rather than targets.

Customer service and sales staff must now handle technical questions and may even be recruited from enthusiast communities. Insiderism raises the bar: anyone representing the brand is expected to know their stuff.

# 8.4

## SIGNALS IN THE MARKET

### DEEP-DIVE CONTENT

High share of product-focused, ingredient-focused, and spec-focused content on Xiaohongshu, Bilibili, and forums.

### KOC ADOPTION

Rapid adoption of KOC programs and micro-influencer strategies across beauty, tech, baby, and hobby categories.

### OPEN STANDARDS

More brands publishing test data, origin information, and detailed FAQs as standard practice.

# 8.5

## IMPLICATIONS FOR BRANDS



### **ASSUME YOUR CUSTOMER IS (OR WILL CONSULT) AN EXPERT**

provide substance over hype – thorough specs, origin details, and clear explanations.



### **MAKE EDUCATION CENTRAL TO MARKETING**

use comparison tables, demo videos, long-form explainers, and live FAQ sessions.



### **BUILD LONG-TERM RELATIONSHIPS WITH ENTHUSIAST COMMUNITIES**

VIP forums, early access, co-created limited editions, and direct dialogue with product teams.



### **TREAT TRUST AS A KPI**

track sentiment, community engagement, and correction of misinformation as carefully as you track sales.

Once convinced, these insider consumers can become your strongest advocates – each capable of influencing dozens or hundreds of peers through their micro-networks.

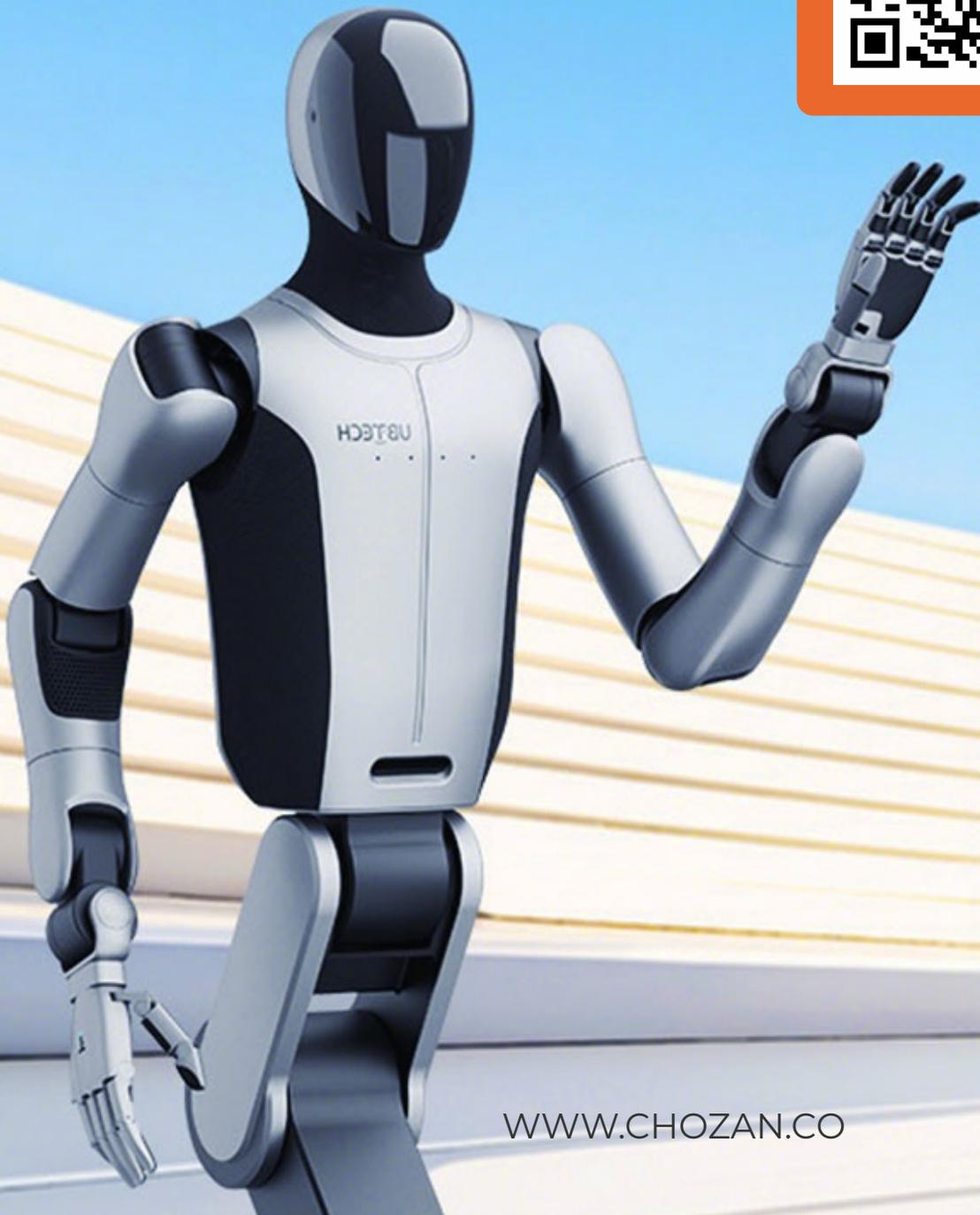
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# 09

## TREND 9 — SOUL-NOMADS: PRIORITIZE EXPERIENCES & HEALING

Experiences as Emotional Outlets  
(Macro, Not Micro)

Rituals and “Healing” Consumption

Emotional Drivers of Consumption

Signals in the Market

Implications for Brands

# TREND 9 —

## SOUL-NOMADS: PRIORITIZE EXPERIENCES & HEALING

- Building on Trend 3, consumers protect budgets for bigger emotional escapes, not just small treats.
- Travel, events, and “healing spaces” are treated as essential pressure-release valves.
- Brands that frame experiences as recovery and meaning — not just fun — capture resilient demand.

In Trend 3, we saw how Chinese consumers act as “rational emotionalists”: strict on routine spend, but protective of emotionally essential categories. This trend zooms in on the large-scale side of that equation — how people use travel, entertainment, and “healing” experiences to reset mentally and emotionally.

Travel, in particular, has become a “routine, much-looked-forward-to” activity - with nearly 45% of people spending ¥5k-¥12k (\$695 to \$1668) per trip, pushing travel budgets upward. China logged 65.22 billion domestic trips in 2025 and RMB 6.3 trillion (\$910 billion) in domestic tourism spending.



# 9.1

## EXPERIENCES AS EMOTIONAL OUTLETS (MACRO, NOT MICRO)

Young consumers treat experiences as essential budget lines rather than optional extras. A recent report found that over 90% of Gen Z respondents prioritize “emotional value” in spending. One musical theater fan attended eight shows in a year and described being invited on stage to sing as an “unforgettable experience” that made the sleepless night spent buying tickets “worthwhile. Such stories are familiar. From pop concerts, escape room games (the hashtag “escape room stress relief” has 80M+ views).

When money is tight, they often cut elsewhere to preserve:

- ✓ Domestic trips, short road trips, and “niche” destinations that feel far from daily routines.
- ✓ Concerts, festivals, theater, and immersive entertainment that deliver intense emotional highs.
- ✓ Activities with friends or partners that create deep, shared memories.

The logic is simple: a few high-quality experiences a year make the daily grind tolerable. This is a different layer from the micro-joys and rituals covered in Trend 6.

# 9.2

## RITUALS AND “HEALING” CONSUMPTION

Alongside these larger escapes, people are building smaller “healing moments” into their weeks. The goal is to release pressure before it becomes overwhelming.

This includes creative workshops like pottery or painting that demand focus and calm, as well as gentler practices such as tea sessions, journaling, yoga, stretching, or basic meditation.

Even deliberately “doing nothing” — sitting in a park or reading alone in a café without scrolling — is being revalued as a valid, intentional activity.

## 9.3

### EMOTIONAL DRIVERS OF CONSUMPTION

Surveys of Chinese shoppers show that roughly 60–65% of consumers, led by Gen Z, now cite emotional fulfillment as a key driver of purchase decisions – from travel and concerts to blind-box toys and “little treats” that brighten the week.

Underneath is an apparent belief: emotional relief is a legitimate reason to spend. Consumers are comfortable saying they travel, attend concerts, or join workshops purely “to feel better” — not for status or utility.

This gives power to:

#### CREDIBLE PROMISES OF STRESS RELIEF & RESET

Brands that can credibly promise stress relief, comfort, or a reset.

#### SAFE SPACES FOR DECOMPRESSION

Destinations and venues that become known as “safe spaces” to decompress.

#### EMOTIONAL BENEFITS TIED TO PERSONAL GROWTH

Services that link emotional benefit to personal growth — language camps, fitness trips, creative retreats.

## 9.4

### SIGNALS IN THE MARKET

#### RELAXATION-FOCUSED DOMESTIC TRAVEL

Domestic travel and short breaks positioned around “relaxation,” “slow pace,” or “healing” are gaining prominence.

#### URBAN WELLNESS STUDIO GROWTH

Urban studios and spaces offering pottery, yoga, breathwork, or mindfulness sessions are expanding.

#### SLEEP & HOME CALMING BOOM

Content and products about sleep, stress relief, and turning homes into calming spaces are becoming more visible.

# 9.5

## IMPLICATIONS FOR BRANDS

For many consumers, the key question has shifted from “Is this fun?” to “Does this make me feel better?” Brands that answer that second question clearly gain an edge. They can:



### DECOMPRESSION TOOL FRAMING

Frame products, services, or trips explicitly as decompression tools, not just entertainment.



### REPEATABLE RESET RITUALS

Build in simple, repeatable rituals so consumers know exactly how to use them to reset after a long day or week.



### COMMUNITY HEALING FORMATS

Connect healing with community by offering group formats, clubs, or events that allow people to unwind together.

Brands that credibly support this need for emotional escape and recovery can become part of consumers’ ongoing “soul maintenance” plans, not just one-off purchases.

# 10

## TREND 10 — DEEP TRUST ERA: LOYAL TO A FEW RELIABLE LONG-TERM PICKS

Clear Values and Consistent  
Delivery

Emotional Bonds over Broad  
Marketing

Trust Ecosystems and

Private-Domain Engagement

Signals in the Market

Implications for Brands

## 10

# TREND 10 — DEEP TRUST ERA: LOYAL TO A FEW RELIABLE LONG-TERM PICKS

- In a slower, more uncertain economy, consumers narrow down to a small set of “consensus” brands they deeply trust.
- Once in this set, brands enjoy strong loyalty and can command moderate premiums — as long as they continue to deliver.
- Trust is built across product quality, values, service, and data behaviour; one misstep can quickly break it.



# 10.1

## CLEAR VALUES AND CONSISTENT DELIVERY

Consumers are judging not only what brands sell, but what they stand for. They look for clear principles – quality, social responsibility, craftsmanship, service, or innovation – and then watch closely for consistency.

A study of affluent Chinese consumers in Hong Kong found:

✓ 6 in 10 will maintain loyalty to brands they truly trust – around six times the loyalty shown to brands they trust less.

✓ Trusted brands can command about a 7% price premium before customers actively consider alternatives.

The message is blunt: “Show me that you reliably deliver on your promise, and I’ll stick with you – even if you cost more.” A scandal, quality lapse, or insincere campaign, however, can quickly break that trust consensus.

# 10.2

## EMOTIONAL BONDS OVER BROAD MARKETING

In this environment, big, generic campaigns matter less than genuine relationship-building. Brands that reached out during hard times – extending warranties, offering supportive messages, or sending small care gifts during the pandemic – earned goodwill that outlasted short-term promotions.

Instead of one-size-fits-all advertising, brands increasingly rely on:

### INSTEAD OF ONE-SIZE-FITS-ALL ADVERTISING, BRANDS INCREASINGLY RELY ON:

- Micro-targeted, sincere communications through owned channels.
- Private communities and loyalty programs that make customers feel known and valued.

Official WeChat accounts, mini-programs, and membership clubs provide quieter spaces for two-way dialogue, making customers feel like insiders rather than just traffic.

# 10.3

## TRUST ECOSYSTEMS AND PRIVATE-DOMAIN ENGAGEMENT

Leading brands are building trust ecosystems – integrated networks of touchpoints designed to reinforce confidence and lock in loyalty:

### VIP APP

VIP apps with exclusive content, service, and offers.

### EXPERT DIALOG

WeChat groups where top customers can talk directly to brand experts.

### COMMUNITY BUILDING

Offline clubs, events, and meetups that turn shared brand use into community.

This is the logic of 私域流量 (private traffic): move loyal customers from noisy public platforms into brand-controlled spaces where they get personalized rewards, early access, and fast support. Many cosmetics and fashion brands, for example, run mini-program stores with membership tiers, birthday gifts, design webinars, and priority service.

As customers engage more, brands gather better first-party data and can serve them more precisely – strengthening trust, which in turn encourages deeper engagement. User testimonials, referrals, and fan communities add a social proof layer, signaling to others that “this is a safe, reliable choice.”

# 10.4

## SIGNALS IN THE MARKET

### STRATEGIC MEMBERSHIPS

Rising importance of loyalty programs and membership tiers as strategic, not tactical, assets.

### PRIVATE-DOMAIN GROWTH

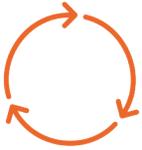
Growth in private-domain operations (mini-programs, brand apps, WeChat groups) versus reliance on pure marketplace traffic.

### HUMANIZING BRANDS

Increased use of customer stories, staff spotlights, and social-impact narratives to humanize brands and show values in action.

# 10.5

## IMPLICATIONS FOR BRANDS



### VALUE ALIGNMENT

Define and communicate clear long-term values – then align product, service, and communication consistently with them.



### QUALITY COMMITMENT

Treat quality control and customer experience as non-negotiable; when mistakes happen, respond quickly, transparently, and humanly.



### REAL REWARDS

Invest in robust loyalty and private-domain programs that deliver real advantages (service, access, community), not just points.



### VALUES IN ACTION

Use storytelling to highlight real employees, customers, and causes to make values tangible.



### TRUSTED PARTNERSHIPS

Partner with other trusted entities (heritage brands, certification bodies, respected institutions) to reinforce credibility.

In the Deep Trust Era, loyalty is less about constant novelty and more about repeated proof. Brands that earn a place in consumers' trust ecosystems can expect stronger resilience, better word-of-mouth, and durable pricing power.

# 11

## TREND 11 — OMO BLEND: IMMERSIVE CONTEXTUAL CONSUMPTION

From Shopping Scenes to Emotional Journeys

Sensory and Immersive Elements

OMO Amplifying Emotional Connection

Signals in the Market

Implications for Brands

# TREND 11 —

# OMO BLEND: IMMERSIVE CONTEXTUAL CONSUMPTION

Chinese retail and marketing are shifting from simply staging “check-in” scenes to orchestrating emotionally coherent journeys that span online and offline. The goal is no longer just convenience, but making consumers feel understood, connected, and part of something – using OMO (online-merge-offline) as an emotional, not just logistical, system.

## 11.1

### FROM SHOPPING SCENES TO EMOTIONAL JOURNEYS

In the early “scene economy,” brands focused on Insta-worthy pop-ups and décor to drive foot traffic. Now, consumers want more than a backdrop – they want a story they can move through.



A typical empathic journey might:

✓ Start with an interactive teaser on WeChat or Douyin that sets an emotional tone (nostalgia, excitement, empowerment).

✓ Continue in-store with a themed event, live demo, or mini-festival that lets people participate, not just observe.

✓ Continue in-store with a themed event, live demo, or mini-festival that lets people participate, not just observe.

Malls are adapting accordingly. As Jacky Zhu of JLL China notes, many are adding lounges, social zones, and hobby meetups designed to “create joyful experiences and foster connections between shoppers and their peers,” shifting focus from individual shoppers to shared experiences.

## 11.2

### SENSORY AND IMMERSIVE ELEMENTS

Technology is enabling “phygital 2.0” – spaces layered with interactive digital elements that feel personal rather than gimmicky. AR mirrors let shoppers try outfits or makeup with playful effects. AI-driven art walls respond to movement. Haptics, soundscapes, and lighting are used to deepen mood.

#### EMOTIONAL COMFORT EXPERIENCE

Audi’s “Take a Break Today” campaign invited stressed consumers to lie down in the back of a car, physically experiencing comfort and spaciousness as emotional relief.

#### LUXURY HOSPITALITY FUSION

Luxury brands add hospitality elements – tea ceremonies, art exhibitions, or, in the case of Louis Vuitton’s Chengdu restaurant, full dining experiences that merge local culture with brand atmosphere.

These sensory touches aim to create memories, not just impressions.

# 11.3

## OMO AMPLIFYING EMOTIONAL CONNECTION

China's mature OMO infrastructure ensures the experience doesn't end at the door. Brands work to carry the emotional high back into digital life:

### SEAMLESS CARE FUSION

A beauty brand may pair empathic, caring in-store consultations with app-based follow-ups, such as personalized skincare advice, thank-you messages, or routine reminders that mirror the warmth of the visit. Shiseido, for example, trains staff to anticipate needs offline and reflects this care in its digital touchpoints.

### DIGITAL MEMORY HOOKS

Events often come with digital "memory hooks": hashtags, challenges, or collectible digital badges earned on-site, which fans then display in WeChat groups or mini-program profiles.

OMO in this context is about sustaining an emotional narrative across platforms, not just syncing inventory or payments.

# 11.4

## SIGNALS IN THE MARKET

### SOCIAL-CENTERED RETAIL

Growth of store formats and malls centered on social spaces, lounges, workshops, and events, not just transactional retail.

### IMMERSIVE TECH FUSION

Increased use of AR/VR, interactive installations, and hospitality elements in flagship and pop-up experiences.

### DIGITAL AFTERGLOW

More campaigns designed with built-in digital "afterglow" – follow-up content, communities, or collectibles that extend emotional engagement.

# 11.5

## IMPLICATIONS FOR BRANDS

To ride this trend, brands need to treat experience as a strategic asset, not a side project:



### EMOTIONAL JOURNEY MAPPING

Map emotional states across the journey – curiosity, anticipation, peak, afterglow – and design touchpoints (online and offline) to support each stage.



### EMPATHIC AI SERVICE

Train frontline staff in empathetic service and back them with data/AI so interactions feel both human and highly relevant.



### CO-CREATION CAMPAIGNS

Build interactive campaigns that invite participation and co-creation (UGC, co-designed events, fan input), turning customers into actors in the brand story.



### EMOTIONAL FOLLOW-UP

Ensure CRM, apps, and social channels follow up in ways that remind customers how they felt, reinforcing the connection rather than just pushing offers.

Done well, OMO becomes the backbone of a relationship, not just a channel strategy – turning satisfied shoppers into emotionally invested advocates.

# 12

## TREND 12 — GUOCHAO 3.0: FOCUS ON ICH + REGIONAL TRAITS

From National Pride to Regional Chic

Heritage x Modern Design

Authenticity and Differentiation

Signals in the Market

Implications for Brands

# TREND 12 —

## GUOCHAO 3.0: FOCUS ON ICH + REGIONAL TRAITS

Chinese consumers are in the midst of a cultural identity renaissance often called Guochao (国潮) 3.0. It's no longer just "buy Chinese brands"; it's about celebrating heritage, region, and identity in modern, design-forward ways. Domestic products with genuine cultural storytelling are thriving – and even foreign brands must align with this wave to stay relevant.

### 12.1

#### FROM NATIONAL PRIDE TO REGIONAL CHIC

Earlier Guochao phases focused first on established Chinese brands (1.0) and then on high-tech domestic products (2.0), thereby winning over imports. In 3.0, the emphasis shifts to cultural IP and heritage. Young consumers embrace traditional culture in everyday life: wearing Hanfu casually, bingeing on historical dramas and animation, and visiting museums and cultural sites in large numbers.

2023's Tang poetry animated film *Chang An* (8.2 on Douban, 20M viewers) and 2024's AAA game *Black Myth: Wukong* (30M+ global sales) already proved the appeal of Chinese cultural revival. This momentum soared in 2025 with *Ne Zha: The Sea Monster Strike* – the blockbuster grossed RMB 14.6B globally, wowing audiences with its refreshed mythic storytelling, and showed Chinese legends still resonate deeply worldwide with top-tier production.

Pride is also increasingly regionalized: people seek specialties from their own city or ethnicity – a snack from Chengdu, a T-shirt featuring Shanghai's skyline, jewelry made with Miao minority silvercraft.

City IP and regional ingredients (such as Yunnan flowers in skincare or Xinjiang cotton in fashion) help consumers connect with specific places and stories.

# 12.2

## HERITAGE X MODERN DESIGN

Guochao 3.0 is defined by the fusion of old and new. Consumers want products that carry a story – an ancient legend, a traditional craft, a nostalgic brand – but executed with modern quality and aesthetics.

Examples include:

### ANCIENT CRAFT REVIVAL

Pantene partnered with a 1,000-year-old hair embroidery craft to create an artwork made from hair treated with its products, showcased via a “Miracle Salon” event that linked Tang dynasty technique to contemporary female confidence.

### GARDEN-INSPIRED CONCEPT

Starbucks’ “Heritage concept” store in Suzhou, drawing on classical garden architecture and local teas.

### SILVER CRAFT COLLABORATION

HeyTea is collaborating with a lifestyle magazine and a Miao silver artisan to create silver-inspired cups and a real handcrafted silver prize, honoring Miao silversmith tradition.

In these cases, brands – local and global – treat Chinese culture as a co-star, not a surface pattern. Done well, such projects deliver emotional value and support artisans and communities at the same time.



# 12.3

## AUTHENTICITY AND DIFFERENTIATION

Authenticity is the filter. Consumers can quickly spot superficial “dragon print for Chinese New Year” efforts. Winning brands deeply engage with culture: working with real craft inheritors, investing time to understand stories, and integrating elements in ways that feel natural.

Chinese skincare brand Winona, for example, consistently features Yunnan minority crafts and ingredients as part of its core identity, not as a one-off campaign. This sustained commitment builds credibility and differentiation.

An eyeshadow palette inspired by Dunhuang caves or sneakers referencing Chinese calligraphy stand out versus generic global designs – if quality matches the price.

Earlier Guochao waves sometimes faltered due to weak quality or overpriced patriotic merch. Today’s consumers are patriotic and practical: they support local brands when quality is equal or better.



# 12.4

## SIGNALS IN THE MARKET

### CULTURAL HERITAGE REVIVAL

Rising popularity of Hanfu, museum IP, historical dramas, and culturally themed animation.

### CITY-BRANDED PRODUCTS

Growth of city-branded merchandise and products that highlight regional crafts or ingredients.

### ICH COLLABORATIONS

Increasing frequency of ICH (intangible cultural heritage) collaborations by both domestic and foreign brands.

# 12.5

## IMPLICATIONS FOR BRANDS



### HERITAGE-LED BRANDING

Treat Chinese culture as a deep resource, not a decorative afterthought: build brand stories, products, and IP arcs around real heritage links.



### ROOTS REVIVAL

For domestic brands, double down on roots: revive time-honored IPs, highlight local sourcing and craftsmanship, and make culture core to positioning.



### RESPECTFUL LOCALIZATION

For international brands, localize respectfully: collaborate with Chinese artists, museums, and craftspeople; tailor concepts by city or region rather than using a single “China” theme.



### CULTURAL PRIDE CONNECTION

Tie into pride and community: connect with national moments, local festivals, and user-generated cultural expression including Hanfu challenges, museum collab drops).

Executed sincerely, Guochao 3.0 doesn't just drive sales; it earns respect and emotional loyalty, making the brand part of how consumers express who they are and where they belong.

# 13

## #1 —

# BEAUTY & PERSONAL CARE INDUSTRY GUIDE

Growth Segments

Consumer Motivations

Risks & Missteps

Opportunities for Innovation

# #1 — BEAUTY & PERSONAL CARE INDUSTRY GUIDE

## TRENDS IN 2026:

- 1) DERMACOSMETICS
- 2) TCM-MODERN HYBRIDS
- 3) WELLNESS-LINKED BEAUTY AND SUPPLEMENTS



# 13.1

## GROWTH SEGMENTS

Scientific, evidence-led beauty is moving from niche to mainstream. Dermacosmetics and “medical-grade” skincare will surge, driven by insiderist, ingredient-savvy consumers who want proof over promises. Brands like Winona and SkinCeuticals, which emphasize clinical research, have a head start.

In parallel, Guochao 3.0 is reshaping aesthetics and formulations:

- ✓ TCM-inspired ingredients (ginseng, pearl, mugwort, snow fungus) in modern textures and formats.

- ✓ Cultural IP in design – think Florasis-style packaging, motifs drawn from opera, Dunhuang murals, or museums.

Two other engines of growth:

- ✓ **Men’s grooming and wellness beauty** – from simple routines (face wash + toner) to hair-loss, acne, and sun-care solutions, plus stress-relief formats like scalp massage.

- ✓ **Beauty × wellness convergence** – ingestible beauty (collagen drinks, gummies, vitamins), sleep/relaxation products, and tools like LED masks or massage devices.

Sustainable and “clean” positioning will gain traction where it supports Deep Trust: safe formulations, credible safety testing, and visible environmental steps.

# 13.2

## CONSUMER MOTIVATIONS

Chinese beauty consumers now balance:

### SELF-EXPRESSION

distinctive looks, culturally rooted styles (Trend 6), and playful colors or textures.

### SELF-CARE RITUALS

skincare as “me time,” paired with micro-joys and daily ceremonies.

### SMART INVESTMENT

products must clearly work. A ¥500 (\$71) serum needs to deliver visible, relatively fast results or a long shelf life per bottle.

They rely heavily on:

Ingredient breakdowns and comparisons.

KOC reviews and community verdicts on Xiaohongshu, Bilibili, and WeChat groups.

Brand safety records and consistency.

Emotional benefits still matter – joy, confidence, stress relief – but are now layered on top of rational, evidence-based expectations.

# 13.3

## RISKS & MISSTEPS

Key pitfalls in 2025–26:

### OVER-CLAIMING WITHOUT DATA

loose “miracle” claims get torn apart by ingredient communities and can trigger regulatory issues.

### IGNORING LOCALIZATION

failing to reflect local holidays, shades, textures, or Asian skin concerns makes a global brand feel generic.

### CELEBRITY-ONLY PLAYBOOKS

expensive KOLs without product substance or fit now feel outdated; consumers no longer “buy just for the face.”

**SLOW INNOVATION CYCLES**

beauty trends move at Douyin speed; brands that refresh too slowly lose visibility.

**DATA AND PRIVACY MISSTEPS**

as more brands use skin-analyzer apps and diagnostics, misuse of face/skin data is a trust killer.

# 13.4

## OPPORTUNITIES FOR INNOVATION

**AI & AR BEAUTY TECH**

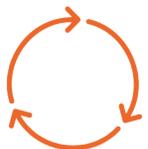
- AI skin diagnostics that generate personalized routines.
- AR try-on and virtual beauty advisors that turn in-store and in-app journeys into empathic experiences.

**CO-CREATION WITH INSIDERS**

- Invite super-users and KOCs to vote on shades, textures, and formats.
- Run clinical-style community trials and publish the results to reinforce Insiderism and Deep Trust.

**CULTURAL COLLABORATIONS AT SCALE**

- Limited editions with museums, artists, or time-honored brands
- Use culture as a long-term platform, not just for the Chinese New Year.

**OMO & PRIVATE-DOMAIN PLAYS:**

- Mini-program stores offering booking for in-store facials, skin checks, or members-only events.
- Ongoing educational content streams – ingredient explainers, routines, case studies – to keep savvy consumers engaged.

Brands that combine clinical proof, cultural relevance, and wellness benefits will be best positioned to win repeat purchase and advocacy.



## KEYNOTE SPEECHES

### WHO IS INSPIRING YOUR TEAM TO FEEL, THINK, AND ACT DIFFERENTLY?

Ashley doesn't just talk about China trends. She shows innovation in action. How AI is reshaping retail. How consumers are driving disruption. How businesses are applying tech on the ground. Not just theory – but what's working right now.



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# 14

## #2 —

# FASHION, LUXURY & LIFESTYLE INDUSTRY GUIDE

Growth Segments

Consumer Motivations

Risks & Missteps

Opportunities for Innovation

# #2 — FASHION, LUXURY & LIFESTYLE INDUSTRY GUIDE

TRENDS IN 2026:

- 1) CHINA-CHIC DESIGN
- 2) QUIET, QUALITY-LED LUXURY
- 3) EXPERIENCE-LED OMNICHANNEL



# 14.1

## GROWTH SEGMENTS

Three main growth tracks stand out:

### CHINA CHIC AND LOCAL DESIGNERS

- ✓ Homegrown brands and collections that integrate Chinese cultural elements (Trend 2) are gaining status. Names like PEACEBIRD, Shang Xia, Susan Fang, and Li-Ning show how local aesthetics and narratives can rival global maisons.

### QUIET LUXURY AND HIGH-QUALITY BASICS

- ✓ The value-for-value mindset favors well-made, logo-light pieces with long wear: knitwear, tailoring, crafted denim, minimalist handbags, and shoes that “last 10 years.”

### ATHLEISURE AND WELLNESS APPAREL

- ✓ Soul nomads and wellness-focused consumers (Trends 5 and 9) want outfits that move from yoga to a café to the airport: performance fabrics, comfortable fits, and subtle style.

Add to that:

### RESALE, RENTAL, AND CIRCULAR FASHION

- ✓ platforms like ZZER and Feiyu are growing as consumers seek value, sustainability, and access to luxury at lower cost.

### LUXURY LIFESTYLE EXPERIENCES

- ✓ boutique hotels, art-led restaurants, curated travel, and luxury home décor as emotional escape and home-sanctuary upgrades.

# 14.2

## CONSUMER MOTIVATIONS

Status signaling is evolving from “loud logo” to cultural, aesthetic, and quality signaling:

### RATIONAL DRIVERS

craftsmanship, material quality, fit, versatility, and resale value.

### EMOTIONAL DRIVERS

identity, creativity, and daily rituals (Trends 3 and 6). Fashion is a canvas to show who you are and how you live, not just what you can afford.

### COMMUNITY DRIVERS

streetwear drops, sneaker releases, and collabs are policed and amplified by insider communities.

Luxury buyers, especially Gen Z and young HENRYs, increasingly ask:

“Does this piece feel like me?”

“Is it made well enough to justify the price?”

“Is this brand aligned with the causes and culture I care about?”

# 14.3

## RISKS & MISSTEPS

### CULTURAL MISSTEPS

careless use of Chinese symbols or stereotyping can cause instant backlash in a Local Revival context.

### OVER-RELIANCE ON OLD FORMULAS

traditional runway + celebrity campaigns without digital and experiential innovation feels stale.

### DIGITAL HESITATION

slow adoption of e-commerce, social selling, or livestreaming means ceding traffic and relevance to faster rivals.

### QUALITY LAPSES

social media rapidly amplifies defects or poor after-sales, and rational consumers expect impeccable craftsmanship at luxury prices.

### FAST-FASHION FATIGUE

brands associated with waste, poor quality, or unsafe labor clash with “less but better” and sustainability concerns.

# 14.4

## OPPORTUNITIES FOR INNOVATION

### EXPERIENCE-LED FLAGSHIPS AND POP-UPS



- Immersive spaces that act as galleries, ateliers, or mini-museums of brand heritage.
- Rotating cultural collaborations, installations, and performances to keep visits fresh.

### TECH-ENABLED STYLE JOURNEYS



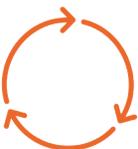
- AR try-ons for accessories, shoes, and beauty.
- AI stylists that build outfits from users' wardrobes or suggest sizing across brands.

### PERSONALIZATION AND CO-CREATION



- Monogramming, made-to-order fits, customizable colorways.
- Co-branded capsules with Chinese artists, cafes, or even auto brands, bringing the fashion brand into broader lifestyle touchpoints.

### OMNICHANNEL LOYALTY ECOSYSTEMS



- Memberships that link online and offline purchases, event access, styling sessions, and digital collectibles.

Fashion and luxury players that marry Chinese cultural intelligence with quality, comfort, and engaging experiences will set the tone – and can defend pricing power even in a cautious market

# 15

## #3 —

# FOOD, BEVERAGE & WELLNESS BRANDS INDUSTRY GUIDE

Growth Segments

Consumer Motivations

Risks & Missteps

Opportunities for Innovation

# #3 — FOOD, BEVERAGE & WELLNESS BRANDS INDUSTRY GUIDE

# 15

## TRENDS IN 2026:

- 1) FUNCTIONAL, HEALTHY INDULGENCE
- 2) REGIONAL/HERITAGE FLAVORS
- 3) CONVENIENT, OMO-DRIVEN EXPERIENCES



# 15.1

## GROWTH SEGMENTS

The sweet spot lies at the intersection of health, taste, and emotional comfort:

### HEALTHY SNACKS AND FUNCTIONAL FOODS

- ✓ high-protein chips, low-sugar versions of classics, gut-friendly yogurt, energy/immune drinks, TCM-infused beverages and snacks tied to sleep, digestion, or immunity.

### PERSONALIZED NUTRITION SERVICES

- ✓ tailored supplement packs, AI-powered meal planning and grocery apps, and wellness subscriptions linked to step counters or health apps.

### MOOD AND MICRO-JOY FOODS

- ✓ drinks and treats positioned around relaxation, focus, or happiness that align with emotional consumption.

### EXPERIENTIAL DINING AND FOOD TOURISM

- ✓ niche regional cuisines, theme restaurants, immersive dining shows, and farm-to-table experiences for soul nomads.

### REVIVED TIME-HONORED BRANDS AND REGIONAL SPECIALTIES

- ✓ 老字号 and local products refreshed with modern packaging and storytelling, riding Guochao 3.0.

# 15.2

## CONSUMER MOTIVATIONS

Chinese consumers want food and drink that:

### FEEL SAFE AND TRUSTWORTHY

clean labels, traceable sourcing, and strong quality control.

### FIT BUSY LIVES

ready-to-eat or quick-prep options, strong delivery, and convenience layers.

### DELIVER BOTH NOSTALGIA AND NOVELTY

childhood snacks reimaged, and “viral” new concepts that are visually and sensorially shareable.

### PROVIDE RATIONAL + EMOTIONAL VALUE

reasonable price for daily staples, willingness to pay more for festival treats, special occasions, or health gains.

Environmental and ethical concerns are rising in urban, educated segments: organic, humane, or low-waste propositions can be differentiators, especially when paired with good taste and convenience.

# 15.3

## RISKS & MISSTEPS

### HEALTH OVER-CLAIMS

promising cures or exaggerated functional benefits without scientific backing is risky in an Insiderism era and may attract regulators.

### SACRIFICING TASTE FOR HEALTH

consumers rarely tolerate bland or unpleasant “healthy” products; the winners achieve both taste and function.

### POOR LOCALIZATION

failing to adapt sweetness, spice, or texture preferences to regional palates limits traction; one-flavor-fits-all rarely works.

### GIMMICKY NOVELTY

extreme flavor experiments can generate short-term buzz but no repeat purchase.

### LOGISTICS AND FRESHNESS FAILURES

spoiled or late deliveries undermine trust quickly as fast, fresh e-commerce grocery becomes normalized.

# 15.4

## OPPORTUNITIES FOR INNOVATION



### TECH-ENHANCED PRODUCTS AND PACKAGING:

- Smart or extended-freshness packaging reinforcing Quality Precision.
- QR codes linking to origin stories, farm videos, or nutrition breakdowns.



### CROSS-CATEGORY COLLABORATIONS:

- Tea brands with anime or game IP, hotpot chains selling broth in retail channels, and dessert brands collaborating with beauty or fashion labels.



### INTERACTIVE AND OMO DINING

- AR menus that show ingredients, origin stories, and suggested pairings.
- Restaurant–retail hybrids where diners can buy sauces, kits, or snacks to recreate the experience at home.



### PRIVATE-DOMAIN COMMUNITIES

- Recipe clubs, tasting groups, and wellness challenges via WeChat groups or brand apps that deepen engagement and repeat purchase.



### AI-DRIVEN RECOMMENDATIONS AND PLANNING:

- Meal and grocery suggestions based on health data, past orders, and household budgets.

Brands that hit the trifecta of taste, health, and emotional comfort – delivered with convenience and storytelling – will find strong demand, even as consumers watch their wallets.

# 16

**#4 —**

## **RETAIL, E-COMMERCE & DIGITAL PLATFORMS INDUSTRY GUIDE**

Growth Segments

Consumer Motivations

Risks & Missteps

Opportunities for Innovation

# #4 — RETAIL, E-COMMERCE & DIGITAL PLATFORMS INDUSTRY GUIDE

TRENDS IN 2026:

- 1) MEMBERSHIP AND PRIVATE-DOMAIN ENGINES
- 2) EXPERIENCE-LED OFFLINE
- 3) AI-POWERED, CONTENT-DRIVEN COMMERCE



# 16.1

## GROWTH SEGMENTS

Retail growth is shifting to new formats and infrastructure:

### MEMBERSHIP-BASED RETAIL

- ✓ Sam's Club, Costco, Hema X, and similar models gain as consumers seek value, exclusivity, and trusted assortments.

### COMMUNITY GROUP-BUYING

- ✓ especially in lower-tier cities - via WeChat and platforms like Pinduoduo blends thrift, social ties, and convenience.

### O2O LOCAL SERVICES

- ✓ 30-minute grocery, on-demand home services, and localized delivery becoming default expectations.

### CONTENT-COMMERCE INTEGRATION

- ✓ Douyin and Kuaishou are as important as "traditional" e-commerce; live commerce and short video have become core retail discovery channels.

### PRIVATE-DOMAIN E-COMMERCE

- ✓ brand mini-programs, apps, and member portals grow as brands seek control over traffic, data, and trust.

### SILVER ECONOMY

- ✓ seniors who adopted digital tools during COVID are now a major audience for health, leisure, and convenience offerings.

### AI RETAIL TECH

- ✓ smart vending, robotic warehouses, AI analytics and personal shoppers as infrastructure for speed and accuracy.

# 16.2

## CONSUMER MOTIVATIONS

Across channels, people want:

### SEAMLESSNESS AND SPEED

switch effortlessly between browsing, trying, buying, picking up, or returning across online and offline.

### VALUE AND TRANSPARENCY

competitive pricing, clear promotions, and reliable service.

### STIMULATION AND SOCIAL CONNECTION

malls as “playgrounds” with exhibitions, cafes, sports, and events; online shopping as entertainment via livestreams and gamification.

### SOCIAL PROOF AND COMMUNITY INPUT

reviews, buyer shows, and influencer/KOC content heavily influence decisions.

### STATUS AND BELONGING

membership tiers and loyalty benefits that feel genuinely premium and useful.



# 16.3

## RISKS & MISSTEPS

### DATA PRIVACY AND SECURITY LAPSES

greater personalization brings higher expectations for responsible data handling; breaches or opaque practices damage trust.

### ENGAGEMENT OVERLOAD

too many notifications, pop-ups, and demands for interaction fuel digital fatigue and app churn.

### MONOTONOUS TENANT MIXES

malls that look identical and fail to refresh experiences lose footfall as consumers chase novelty.

### INFRASTRUCTURE BOTTLENECKS

failure to scale logistics, returns, or customer service during big events (11.11, 6.18) leads to public frustration.

### IGNORING OLDER CONSUMERS

over-focusing on youth culture and overlooking 50+ customers' growing digital comfort and spending power.

### INNOVATION COMPLACENCY

in a hyper-competitive landscape, standing still means losing share to faster, more experimental players.

# 16.4

## OPPORTUNITIES FOR INNOVATION



### UNIFIED COMMERCE AND 360° CUSTOMER VIEW

- Seamless inventory, pricing, and customer data across channels so staff recognize online behaviors in-store and vice versa.
- Simple, universal return and pick-up options across all physical and digital points.

### EXPERIENCE-FIRST STORE FORMATS



- Showrooms with fewer SKUs and more storytelling, try-out spaces, and digital ordering (Trend 11).
- Rotating zones for pop-ups, collabs, and events that keep spaces “Instagrammable” and community-focused.

### VISUAL SEARCH AND SHOPPABLE CONTENT



- Let users screenshot or scan items and instantly find similar products.
- Make dramas, streams, and short videos directly shoppable.

### NEXT-GEN LIVESTREAMING AND AR/VR



- More immersive livestreams where viewers can “walk” through virtual stores, interact with hosts, or test products via AR (Trends 1 and 11).

### AI PERSONAL SHOPPERS AND AGENTS



- Chat-like interfaces within apps that find products, build carts, or suggest full solutions (“outfit for a 3-day trip,” “week of low-sugar meals”).

### CIRCULAR AND SUSTAINABLE RETAIL



- Built-in trade-in, resale, repair, and rental programs on major platforms.
- Rewards for eco-friendly behaviors, potentially linked to wellness or activity data.

Retailers and platforms that make shopping more intelligent, integrated, and enjoyable – while protecting trust and privacy – will set the new baseline for Chinese consumers and capture disproportionate loyalty.

# 17

## BRAND ACTION PLAYBOOK

Layer Emotional + Functional Value

Amp Up Cultural Intelligence

Leverage AI for Personalization at  
Scale

Build Community-Based Trust  
Networks

Quick Wins for Marketers & Retail  
Teams

Long-Term Innovation Opportunities

# BRAND ACTION PLAYBOOK

Understanding trends is one thing; executing against them is the real challenge for brands. In this playbook, we outline strategic moves and quick-win tactics for brands to thrive in 2025–26, along with longer-term innovation bets. These recommendations are geared to help C-level executives, brand managers, marketers, and retail strategists translate insights into action.

## 17.1

### LAYER EMOTIONAL + FUNCTIONAL VALUE

Design every major offer to deliver both practical and emotional value. Functional proof (quality, savings, convenience, efficacy) must sit alongside emotional payoffs (joy, confidence, community, calm).

A smartphone, for example, should showcase battery life and camera specs and how it captures family memories or supports creative expression. Build a simple “reason-to-believe + reason-to-love” checklist and apply it to all flagship products and campaigns to align with the “rational emotionalist” consumer.



## 17.2

### AMP UP CULTURAL INTELLIGENCE

Treat Chinese culture and regional identity as a strategic capability, not campaign decoration. Build local cultural expertise (in-house or via partners), research regional subcultures, and monitor micro-trends on Xiaohongshu, Douyin, Bilibili.

Use this for product design (cultural motifs, localized flavors), storytelling (festivals, values, history), and collaborations (artists, heritage brands, institutions) to ride Guochao 3.0.

Aim for a few deep, iconic moments each year, including sold-out Chinese New Year collections, localized hero products) rather than superficial “dragon-print once a year” drops.

## 17.3

### LEVERAGE AI FOR PERSONALIZATION AT SCALE

Use AI to tailor recommendations, content, and journeys across apps, mini-programs, and service channels. Deploy recommendation engines so each user sees dynamically adapted offers, and test AI assistants such as a chatbot skin advisor drawing on ingredient and routine knowledge, or AI service in private domain channels that powers personalized deals) tied to.

Be transparent about data use and give basic controls; by 2025–26, consumers will expect brands to “know me” and quickly penalize one-size-fits-all experiences that ignore their history.

## 17.4

### BUILD COMMUNITY-BASED TRUST NETWORKS

Shift from broadcast to community cultivation. Identify key interest clusters and build spaces where they interact with you and each other: user forums, WeChat groups, brand-run social communities, loyalty clubs.

Support KOC-driven ecosystems via ambassador programs: seed products to real customers, give them previews, and encourage detailed, honest reviews.

Treat community feedback as an input to R&D and CX and you gradually build a “trust ecosystem” where loyalty is to both the brand and fellow users.

# 17.5

## QUICK WINS FOR MARKETERS & RETAIL TEAMS

### ACTIVATE KOC-LED CONTENT

In your next launch, prioritize 20–50 KOCs and micro-influencers instead of one big KOL. Seed products on Xiaohongshu and Bilibili and brief them for structured, comparable reviews. Resurface the strongest UGC on product pages and social channels, with clear permission.

Run a small “KOC panel” live-stream to let them discuss the products in depth. Within weeks, searchers see richer, trusted content, often boosting conversion.

### INJECT RITUAL INTO PACKAGING & UX

Audit your packaging and key journeys for one added ritual or moment of delight. Add a short “five-minute ritual” card, a reusable or collectible box, a hidden message, or a small extra such as a sticker or sample.

In-store, define a simple ceremony for high-value purchases, for example a bell ring and Polaroid photo above a set threshold. These low-cost touches activate everyday-ritual and micro-joy dynamics from Trend 6. They also strengthen word of mouth and make your brand more memorable.

### REDESIGN OMO CUSTOMER JOURNEYS

Run a short sprint to map one priority customer journey across online and offline. Fix the most obvious breaks first. Sync carts between channels so shoppers can move seamlessly. Enable online booking for test drives, fittings, or consultations.

Send one respectful follow-up after store visits: “You tried X; here’s more info or a one-time offer.” Train staff to connect shoppers to your WeChat or mini-program on the spot. The goal is one continuous emotional arc, not fragmented touchpoints.

### OPTIMIZE PRIVATE-DOMAIN FUNNELS

Review WeChat, mini-programs, SMS, or DingTalk flows. Simplify sign-up, capture basic interests or value tiers, and set up three automated journeys: welcome (brand story, hero products), nurture (content and offers matched to tags), and reactivation, such as “90 days no purchase” prompts).

Use these channels to ask for feedback and run small UGC or referral campaigns. Because private domain is fully controlled traffic, small UX and CRM improvements can materially lift repeat purchase.

# 17.6

## LONG-TERM INNOVATION OPPORTUNITIES

### BUILD PRECISION WELLNESS ECOSYSTEMS



Over 2–3 years, shift from standalone products to a connected wellness platform. Link apparel, devices, and content into an app-driven ecosystem with data sharing, rewards, and coaching.

Extend FMCG lines into personalized vitamins, smart kitchen tools, and nutrition services. The objective is to own a larger share of the proactive health management market and increase customer lifetime value.

### FOSTER CULTURAL REVIVAL COLLABORATIONS



Create a rolling program of collaborations with artisans, museums, time-honored brands, and regional IPs. Each partnership should deliver distinctive Guochao-rich products and tangible cultural support (e.g., craft preservation, community benefits).

This deepens differentiation, strengthens ESG narratives, and makes your brand part of the cultural fabric rather than an outsider borrowing motifs.

### INVEST IN AI-PERSONALIZED PRODUCT DEVELOPMENT



Bring AI into R&D to analyze consumer data, trend signals, and feedback, then generate product variants aligned with niche needs. Examples include ultra-fine shade ranges in beauty, region-specific flavor profiles in beverages, or modular product configurations.

Over time, position new launches as “co-designed by consumers and AI insight” to signal responsiveness and innovation.

### CREATE EXPERIENCE-LED BRAND SPACES



Plan physical and digital spaces that prioritize immersion and community over pure sales. Flagship stores can double as classrooms, clubs, or galleries (workshops, events, IoT demos); online, explore virtual showrooms or persistent brand worlds as tech and consumer behavior evolve.

These spaces feed content, loyalty, and word-of-mouth, and align with empathic, experience-led retail.



## EXPERT DIALOGUES

YOUR COMPETITORS ARE ALREADY TALKING TO INSIDERS. ARE YOU?

Reports tell you what happened. Experts tell you what's happening — and why it matters. Book an expert dialogue and sit down with the people building China's AI models, robotics systems, and cutting-edge technologies. One conversation. Direct access. No filters.



**GET IN TOUCH TO CONNECT WITH AN EXPERT**

# 18

## CHINA'S CONSUMER FORECAST BEYOND 2026

Values, Culture & AI-Mediated  
Living

Next-wave Guochao and  
“Chinese cool.”

AI-shaped Daily Life and  
Commerce

More Active, Demanding  
Consumers

# CHINA'S CONSUMER FORECAST BEYOND 2026

Looking beyond 2025–26, China's consumer landscape will be shaped by structural shifts and bigger psychological changes. Demographics will polarize needs: brands must serve both hyper-connected Gen Alpha teens and active, affluent retirees in their 60s and 70s. Urbanization will shift from single mega-cities to integrated city clusters and deeper digital connectivity of rural markets, opening new growth opportunities in lower-tier cities and villages.

Technological infrastructure – 5G, AIoT, edge computing – will be so embedded that the line between “online” and “offline” becomes almost invisible. By the late 2020s, consumers will expect most objects and services to be intelligent and connected by default.

OMO immersion and AI scenario power will intensify: AI agents will coordinate travel, bills, health routines, and shopping, often acting autonomously and managing many routine choices in the background.



# 18.1

## VALUES, CULTURE & AI-MEDIATED LIVING

Consumer values will continue to shift toward balanced well-being. People will try to hold three things at once: financial security, physical and mental health, and meaningful experiences. At the same time, the common prosperity (共同富裕) agenda will push expectations on equality, sustainability, and social responsibility. So buyers will ask not only “Does this improve my life?” but also “Is this brand acting fairly and responsibly?”

Trust, value, and meaning will stay central, but the bar for trust will rise. It will cover product quality, data protection, labor practices, and environmental impact. Brands that cannot provide proof in these dimensions will struggle to remain in the trusted set.

# 18.2

## NEXT-WAVE GUOCHAO AND “CHINESE COOL.”

Culturally, a new phase of Guochao will likely emerge. Heritage and innovation will blend more tightly. Younger consumers will revive specific dynastic aesthetics, regional crafts, and traditional wellness, often with a tech layer.

### SUBCULTURES WILL FEED INTO THIS MIX:

- Streetwear, hip-hop, skate, anime, gaming, and ACG
- Local scenes in cities and regional “style codes.”

Together they will form a broader “Chinese cool” that shapes mainstream tastes.

Chinese consumers will also push Guochao outward. They will back local champions going global and expect Chinese designs, formats, and digital models to influence overseas markets. Cross-border platforms will make it easy for them to support these brands and shape global demand.

# 18.3

## AI-SHAPED DAILY LIFE AND COMMERCE

Digitally, China may move into XR-assisted daily life. Smart glasses or ambient interfaces could overlay product information, reviews, and offers on what people see around them. Commerce will likely become “ecosystem commerce”:

### COMMERCE WILL LIKELY BECOME “ECOSYSTEM COMMERCE”:

- Shopping flows through social, content, search, and entertainment
- Fewer clear “store visits,” more constant shoppable touchpoints

AI agents will also shift from helpers to delegates. They will learn user preferences, manage budgets, compare offers, and automatically handle routine purchases. As a result, brands will need to optimize for two audiences at once: humans and algorithms.

In practice, that means marketing to recommendation systems as much as to people, so that smart agents “choose” your product on the user’s behalf.

# 18.4

## MORE ACTIVE, DEMANDING CONSUMERS

Consumer activism and co-creation will intensify. Insider communities will gain better tools and more data, and they will expect regular input into:

- Product decisions and feature roadmaps
- Brand policies and responses to social issues

Brands will need faster decision cycles, clearer principles, and more structured ways to collaborate with these groups.

The core needs for trust, value, and meaning will not disappear. What will change is the context: more AI between brands and people, richer cultural layering, and greater consumer participation. Winners will build capabilities for continuous sensing, rapid testing, and honest dialogue with both consumers and the AI systems shaping their choices.

## ACKNOWLEDGMENTS & DISCLAIMERS

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This report is intended for educational and informational purposes only.

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## THE FUTURE IS BEING BUILT IN CHINA. WE'LL TAKE YOU THERE.

China doesn't wait. Every day, new technologies emerge from labs in Shenzhen, Hangzhou and Beijing. Consumer behaviors shift on platforms like Meituan, Taobao and Douyin. Industries transform while the rest of the world is still reading about what happened last month.

ChoZan keeps you in front of it all. Since 2016, we've helped Fortune 500s and emerging players alike navigate, and learn from China's fast-moving innovation landscape. Not from a desk halfway across the world — but on the ground. Inside the ecosystems. In boardrooms. On factory floors. In direct conversations with the people building what's next.

Whether through immersive study tours, executive keynotes, custom innovation research, or expert dialogues, we help you turn China's experience into your competitive advantage.

**If you're ready to learn for China — and learn from China — let's talk.**

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